



“CLICK IT OR TICKET”
MAY 2019 MOBILIZATION
STRATEGIC MEDIA WORK PLAN

Executive Summary

The 2019 “Click It or Ticket” campaign will use a multi-platform approach in order to reach the young male target audience in mediums where NHTSA can engage with them.

Media Strategy

The primary media strategy will continue to build frequency. In order to affect behavioral change, the message must be seen many times within the short campaign period. The goal will be to reach at least 25% of men in the 18-34 target audience at the 8+ effective frequency level over the three-week flight with traditional media (TV and radio).

Advertising Period

- ▶ Paid advertising will run from May 13-June 2, 2019 (21 days)
- ▶ Added value and bonus weight in TV and radio must run within flight and not go beyond June 2
- ▶ Digital non-enforcement, non-paid advertising can run beyond the June 2 flight end, as needed

Working Media Budget

- ▶ \$8,000,000

Audience Segment Profiles

- ▶ Primary Segment – *Influence segment to always use a seat belt*
 - **Caucasian males, 18-34 years of age**
 - ❑ Largest demographic that does not wear seat belts
 - ❑ Of those who drive pickup trucks, seat belt use remains lower than drivers of other vehicle types
 - **Male teens, 15-17 years of age**
- ▶ Secondary Segment – Raise awareness and influence segment to always wear a seat belt
 - **Hispanic males, 18-34 years of age**
 - ❑ Hispanic drivers have lower seat belt use rates than non-Hispanic whites, and higher fatality rates
 - **African American males, 18-34 years of age**

Geography

The campaign will be national in scope with no local or regional activity.

Media Selection & Rationale

A multi-platform approach is imperative in this fragmented media environment. Various mediums will perform at varying levels in reaching the young male targets where some offer better opportunities to reach these audiences than others.

Due to the very short campaign duration, media selection must be restricted to those mediums that will quickly generate its total reach potential and will not have exposure after the campaign end date. For example, a monthly magazine takes 13 weeks to reach its full readership potential and a weekly magazine, seven weeks. The 2019 “Click It or Ticket” campaign will consider the mediums below – each discussed in more detail in the sections that follow. Mediums will be evaluated based on their total reach potential and ability to generate that reach potential in a short time period.

TV

- ▶ Linear
 - Audience Targeting
 - Programmatic
 - Sports
- ▶ Connected TV/Over-the-Top (CTV/OTT)
- ▶ TV Everywhere

Cinema Advertising

Radio

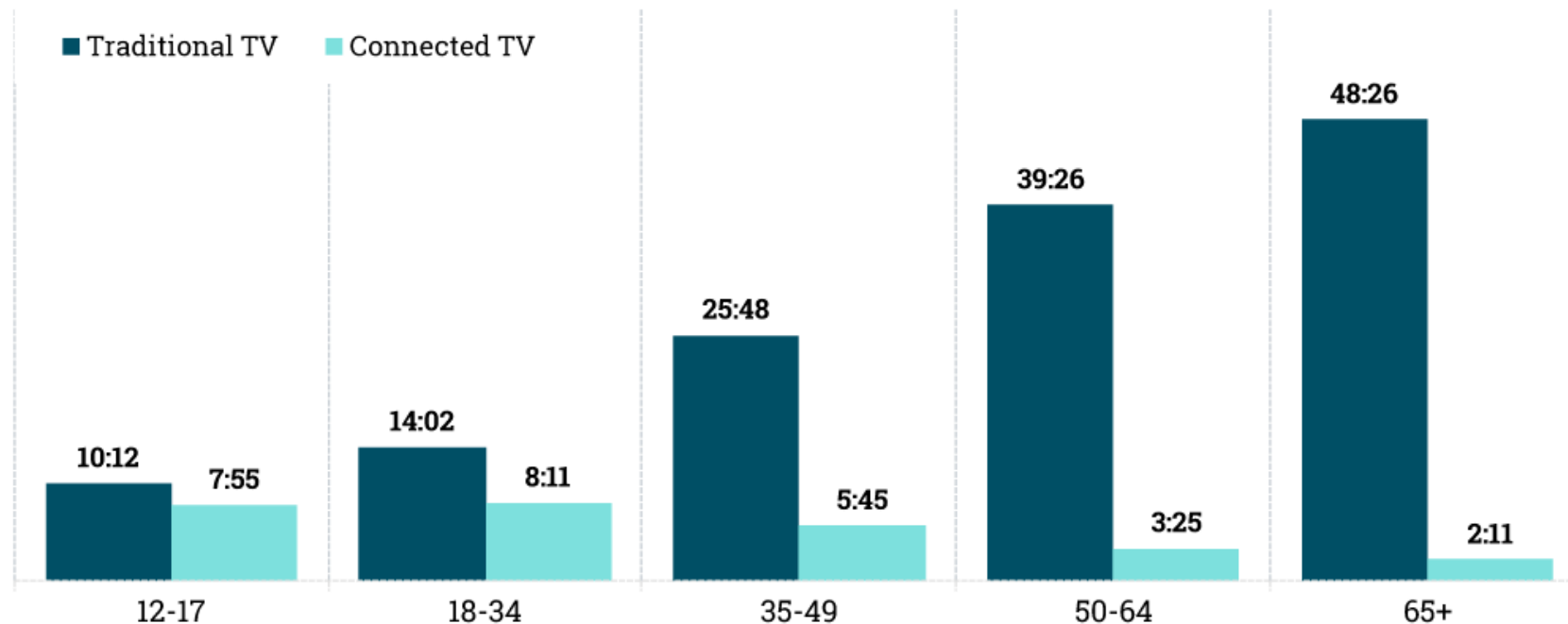
Digital/Mobile

Social

TV

TV is still a key medium to be used in delivering the “Click It or Ticket” message to Millennial young men 18-34 years old. The rise of digital streaming services, such as Netflix and Amazon, is shifting viewership away from traditional "linear" television viewership towards other connected devices – particularly for younger audiences. However, the target demographic is still spending more than 22 hours each week with TV content, as shown in the following chart from the Nielsen Comparable Metrics Report Q2 2018.

Traditional TV vs. Connected TV Viewing in Q2 2018 (weekly hh:mm, total population)



Published on MarketingCharts.com in December 2018 | Data Source: MarketingCharts.com analysis of Nielsen data

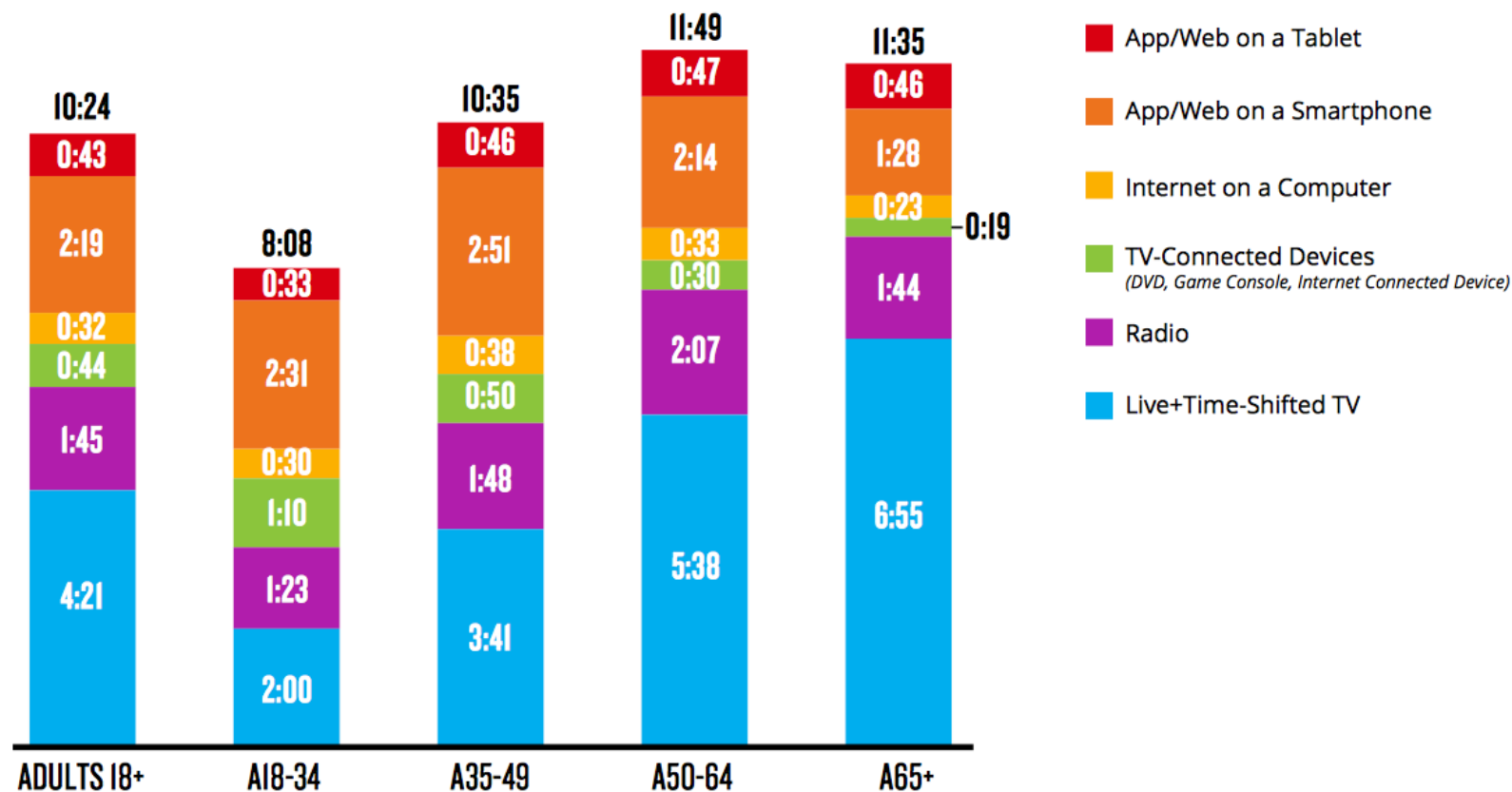
Traditional TV refers to all live + DVR/time-shifted TV viewing during the quarter for the total population

Connected TV refers to DVD/Blu-Ray Devices, Game Consoles, and Internet-Connected Devices (including streaming media players and smart TVs)

Source: 2018 GfK MRI 2018 Doublebase

As shown in the chart below, our target audience spends a significant amount of time watching television daily – including live+time-shifted TV as well as connected device viewing.

Q2 2018 DAILY HOURS:MINS OF USAGE BASED ON TOTAL U.S. POPULATION



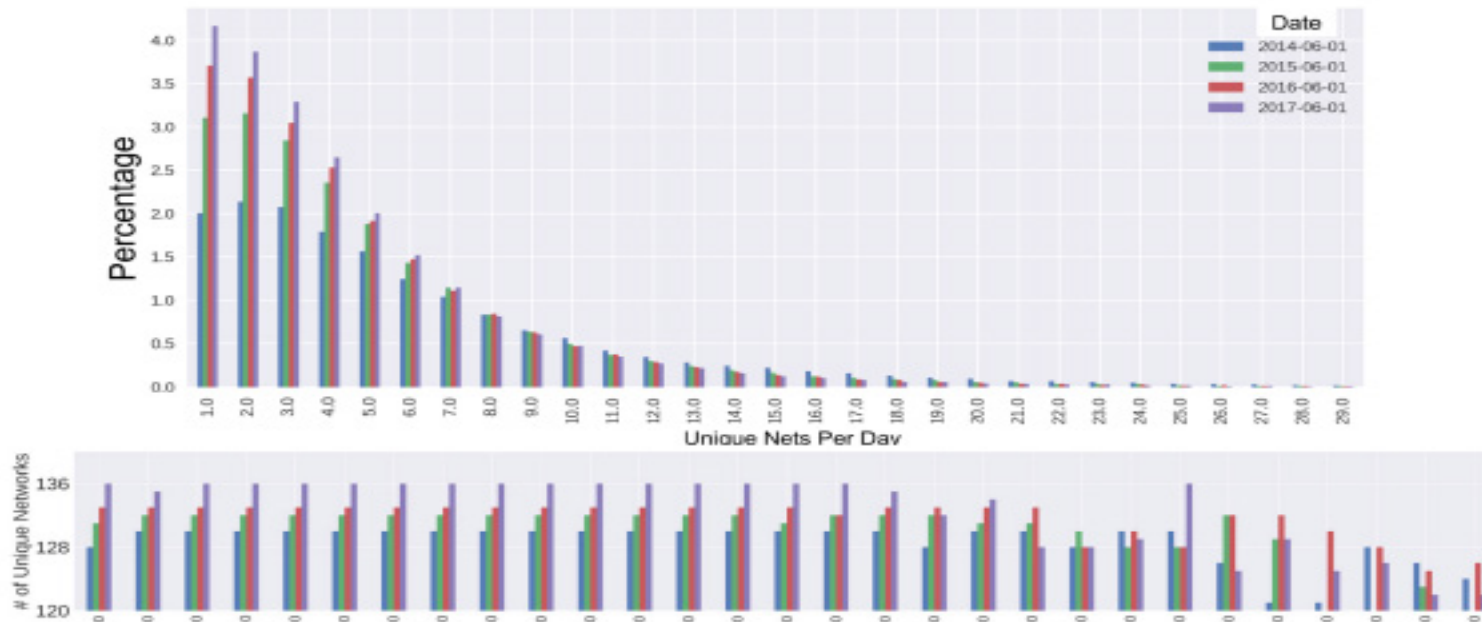
Source: Nielsen Total Audience Report Q2 2018

In order to home in on the “Click It” target audience, TV will be bought using programmatic and audience targeting.

Audience Targeting

We have also learned that people using TV are watching fewer networks when they watch. Given the increasing number of networks available, it'd be reasonable to assume that people are watching more networks. However, the following chart shows that this is not the case. In fact, over the past four years, people are watching fewer networks. The top chart below shows the percentage of all viewers who watched different counts of networks each day, in each year of the time period analyzed. For example, if you turned on the TV, watched two networks, and then turned off the TV, you would be counted among those viewers who viewed two unique networks per day. You'll note that, in the last four years, the percentage of viewers tuning into just one network per day has more than doubled.

The bottom chart illustrates the fragmentation of audiences across TV networks by portraying the number of distinct networks watched by the viewers. It shows us that to reach all of the people who watch just two networks, you'd actually need to advertise on 135 networks.



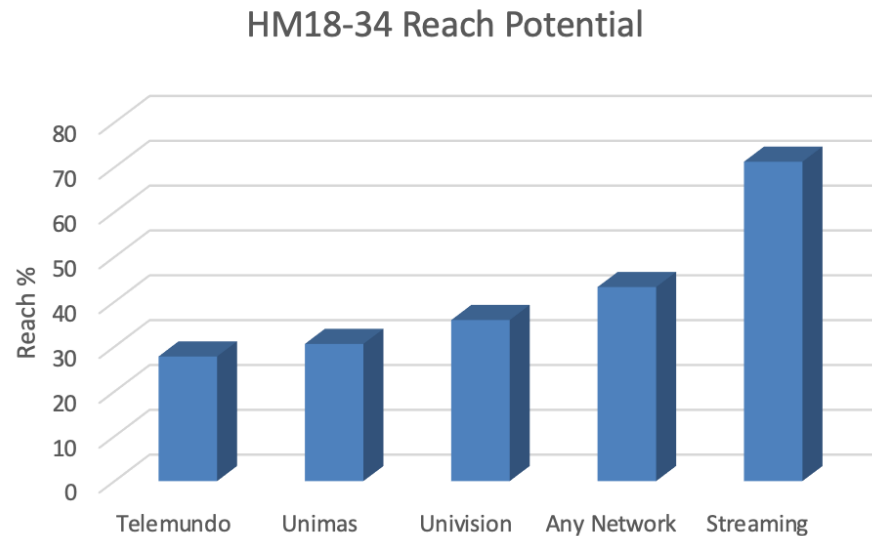
Source: *The Hidden Story Behind TV's Ratings Decline* – Simulmedia 2017

This leads to the need for audience targeting. With audience targeting, NHTSA will not commit to a group of networks to reach those members of the target audience, but rather commit to appropriate programming regardless of the network it may be on. In past NHTSA plans, we have seen upwards of 70 networks included on the buy to maximize the reach of NHTSA's young male audience.

Hispanic Men 18-34

The TV plans to reach young Spanish speaking Hispanic men will not include audience targeting because no scale is available. However, along with key programming on the various Spanish language networks, a CTV/OTT effort will also be used, such as Hulu and YouTube Premium.

The following chart depicts the ability of the key Spanish language networks and streaming video to reach the male Hispanic audience.



Source: 2018 GfK MRI Doublebase

Programmatic

Programmatic, or data-driven automated buying, will use robust research such as Nielsen for information beyond just age and gender. This includes data on psychographics, media usage and consumer behavior. Information is also acquired via set-top-box information as well as audience content recognition that is in a constant cycle of collecting viewership information from Smart TVs.

Sports

Sports still present an opportunity to reach out to young men with programming that traditionally enjoys a high attentiveness level. Major sports occurring during the “Click It or Ticket” flight include the followin

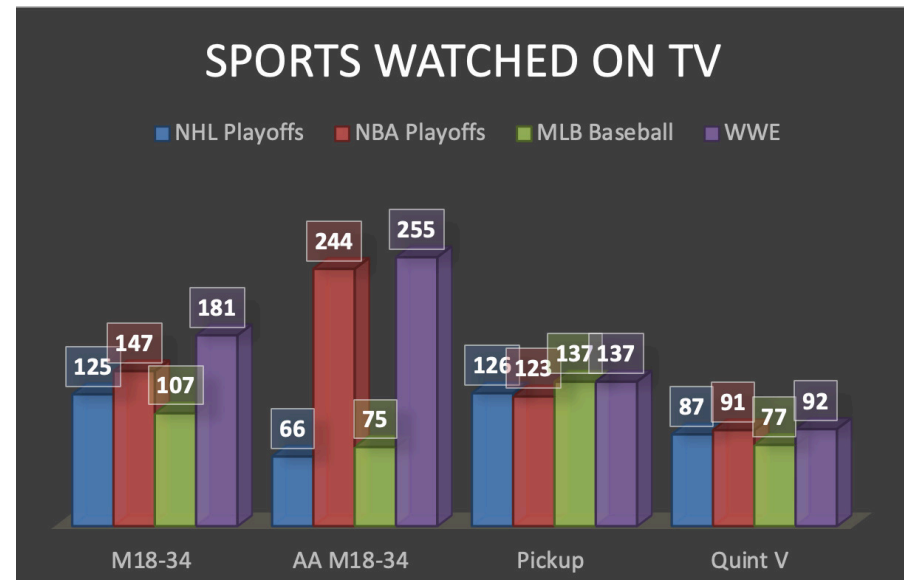
- ▶ NHL Stanley Cup playoffs
- ▶ NBA playoffs
- ▶ Soccer (Champions League Final & Liga MX playoff)
- ▶ MLB games

It is fortunate that two of the youngest skewing major sports, NHL and NBA, are in season during the “Click It or Ticket” flight and that both are in playoffs that traditionally pull in a larger audience. Another format for reaching sports fans is via in-arena signage in MLB stadiums that is seen by the TV audience. Following are some interesting facts on in-arena signage:

- ▶ 70% of fans consider advertisers with TV-visible home plate signage to be official team or league partner
- ▶ 46% of fans have a more favorable impression of in-game home plate advertisers

This chart looks at the index of each of these sports plus MLB and, the ever popular, WWE wrestling against the various target audiences for the “Click It or Ticket” campaign. They are:

- ▶ Men 18-34 – M18-34
- ▶ African American Men 18-34 – AA M18-34
- ▶ Men 18-34 who drive a pickup truck – Pickup
- ▶ Lowest TV viewing quintile (Quintile V) – Quint V



Source: 2018 GfK MRI 2018 Doublebase

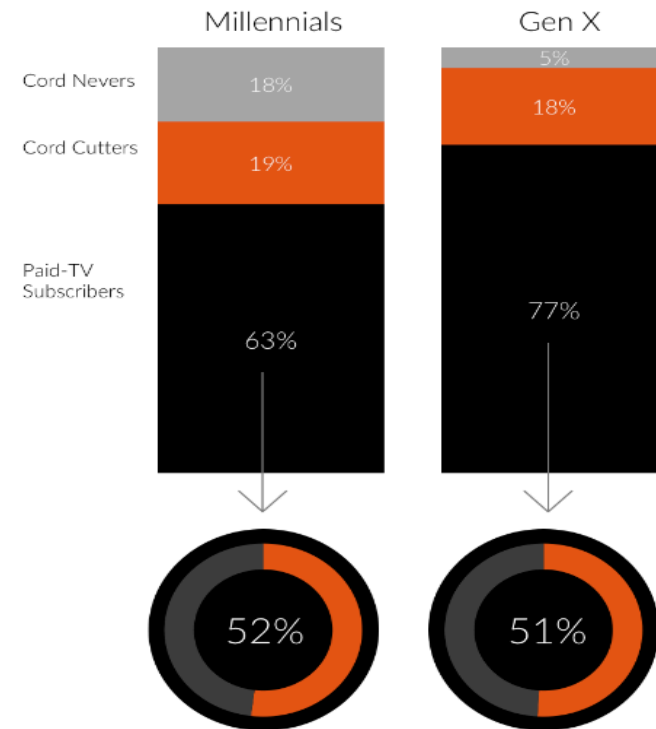
Connected TV (CTV)/Over-the-Top (OTT)

Cord-cutters, those among NHTSA's target audience who have cancelled their paid TV subscriptions, and cord-nevers, those who never had paid TV subscriptions, turn to over-the-top services for their video content.

As the chart at the right shows, among Millennials (those born between the early 1980s and mid 1990s), only 63% currently subscribe to paid TV services. Additionally, 52% of those subscribers have considered cutting the cord in the last 12 months.

We can see a distinct generational difference by comparing this with Generation X (those born between the mid 1960s and early 1980s), amongst whom only 23% have cut the cord (though a similar percentage report considering cord-cutting).






Note: Gen X referenced for comparison purposes only - they are outside the target for this campaign



Source: CG42 via Digital TV.com 2018

We have seen the composition of non-linear devices for video viewing shift significantly from Q1 2014 to Q1 2018. The composition for OTT devices has increased tremendously over this span of time.

COMPOSITION SHARES BY QUARTER

Q1 2014	Q1 2015	Q1 2016	Q1 2017	Q1 2018	
79%	67%	37%	31%	24%	 DESKTOP
3%	8%	22%	32%	34%	 OTT
-	-	14%	16%	16%	 STB VOD
11%	17%	18%	13%	18%	 SMARTPHONE
7%	8%	9%	8%	9%	 TABLET

Source: Freewheel VMR Report Q1 2018

TV Everywhere

TV Everywhere refers to watching TV programming on apps. As an added service to subscribers, cable networks give customers access to content through live or on-demand internet services. This allows subscribers to view programs on devices other than a TV.

Some of the advantages of TV Everywhere are:

- ▶ Average video ad completion rate of 98%
- ▶ Zero ad fraud
- ▶ According to Nielsen data, 56% of ad view composition is 18-34 years old

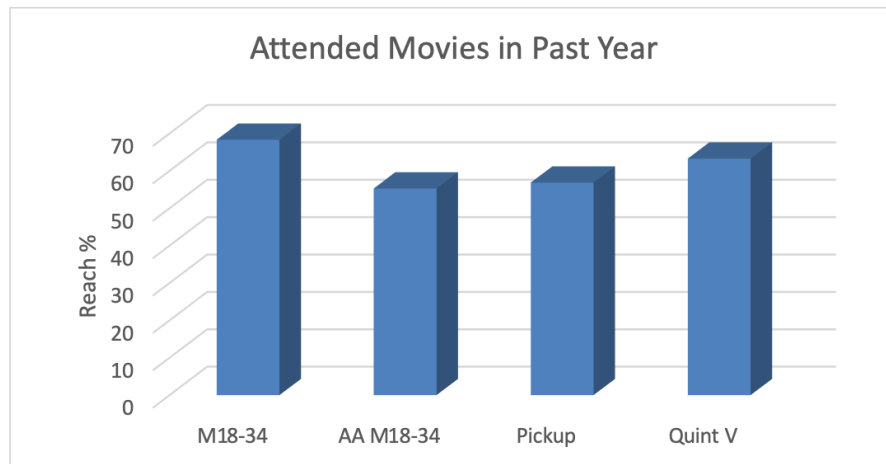
Cinema Advertising

A cinema campaign will run on a national basis covering all states and all markets.

The various NHTSA target audiences enjoy significant reach potential based on having attended a movie. Especially important is the reach to those light users of TV shown in the chart below (Quint V).

The various target audiences for the “Click It or Ticket” campaign indicated in the chart below are:

- ▶ Men 18-34 – M18-34
- ▶ African American Men 18-34 – AA M18-34
- ▶ Men 18-34 who drive a pickup truck – Pickup
- ▶ Lowest TV viewing quintile (Quintile V) – Quint V



Source: 2018 GfK MRI Doublebase

In addition to reach potential, the following details additional reasons to use cinema advertising:

- ▶ Quality programming debuts weekly
- ▶ Engaged audience with no access to ad-skipping devices
- ▶ Association with blockbuster film
- ▶ 50' HD screens; Surround Sound

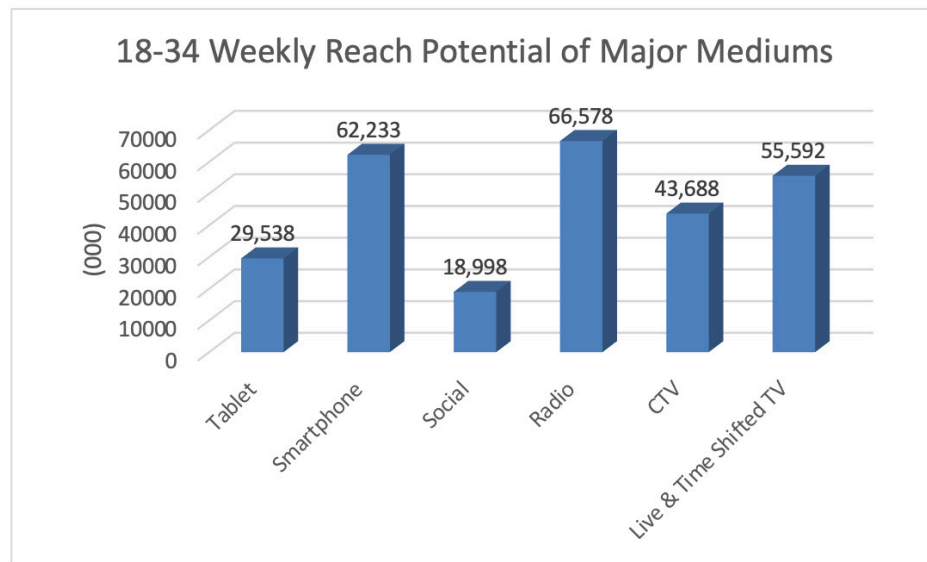
The movies that are expected to play very well during the “Click It or Ticket” campaign are:

- ▶ The Hustle (PG-13) – starring Anne Hathaway, Rebel Wilson
- ▶ John Wick: Chapter 3-Parabellum (not yet rated) – starring Keanu Reeves, Halle Berry
- ▶ Ad Astra (not yet rated) – starring Brad Pitt, Tommy Lee Jones, Ruth Negga
- ▶ Aladdin (not yet rated) – starring Will Smith
- ▶ Godzilla: King of the Monsters (PG-13) – starring Vera Farmiga, Millie Bobby Brown
- ▶ Ma (R) – starring Octavia Spencer
- ▶ Rocketman (not yet rated) – starring Taron Egerton

Radio & Audio Streaming

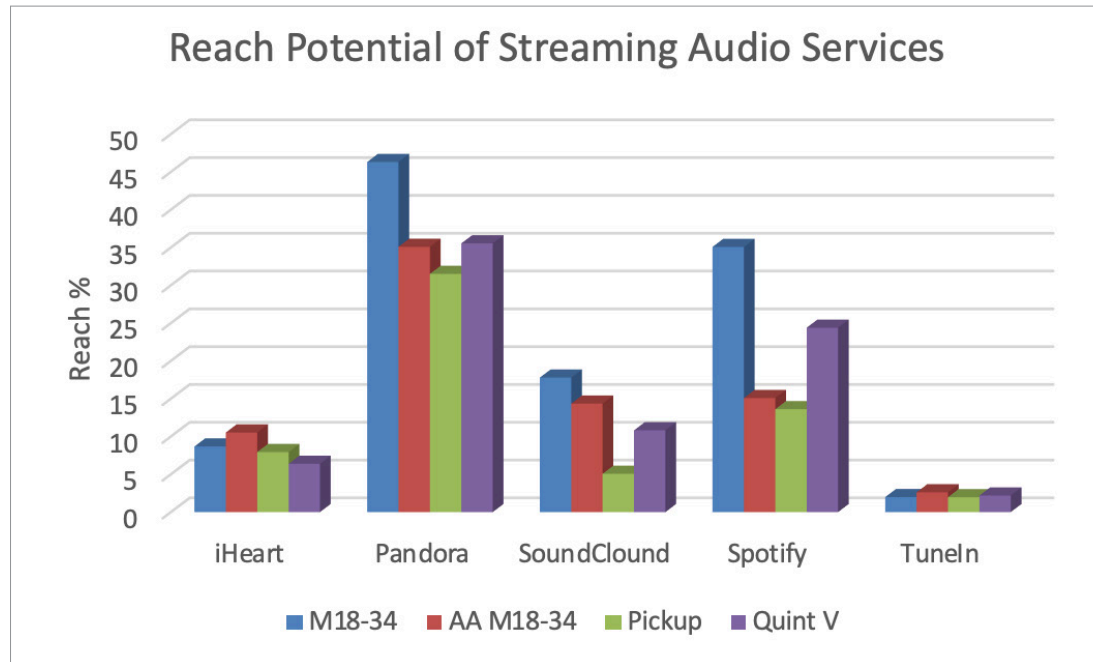
Radio will build reach off the base of TV and will also be a catalyst to build frequency of the “Click It or Ticket” message.

According to the Nielsen Total Audience Report for Q2 2018, radio enjoys more reach among 18-34-year-olds than any other medium.



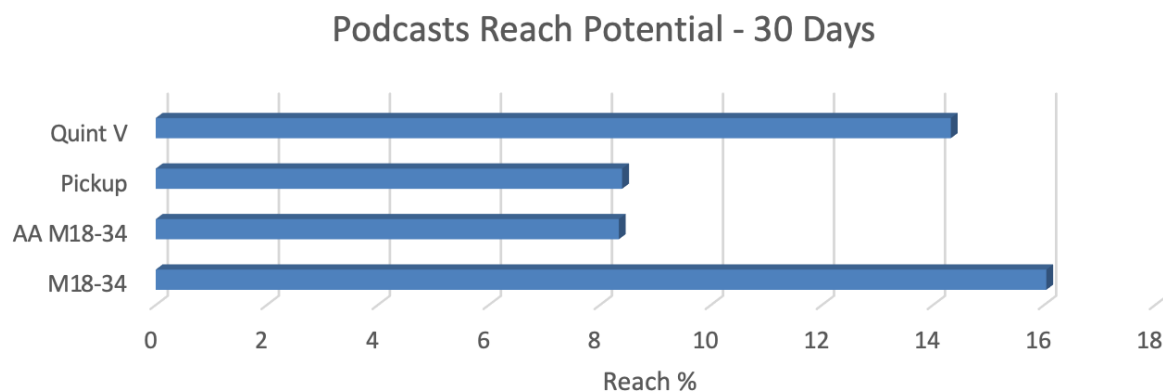
Source: Nielsen Total Audience Report Q2 2019

The reach potential of the major audio streaming services is also high, and when combined with terrestrial radio, will increase reach as well as build frequency to those who use terrestrial radio and a streaming service. Pandora can also directly target men 18-34 who are pickup truck drivers. For planning purposes, we will look to direct 25% of the total impressions to the pickup truck driver.



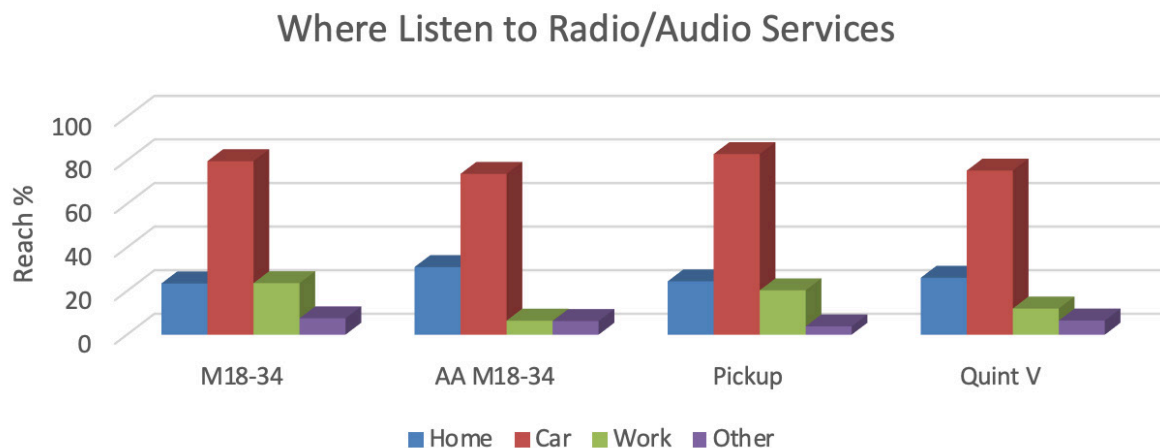
Source: 2018 GfK MRI 2018

Podcasting continues to increase in popularity due to the ability to listen on demand and an affinity with the podcast talent. It performs well against men 18-34, in general, and reaches those lighter users of TV. Opportunities to include podcasts in the plan also will be considered.



Source: 2018 GfK MRI 2018

One of the major advantages of radio and audio services, beyond its very high reach, is that the majority of listening occurs in a vehicle which is the most advantageous time to reach young men with the seat belt message.



Source: 2018 GfK MRI Doublebase

Digital

The digital strategy will be to penetrate the target audience establishing strong message recall by utilizing previously successful channels while also integrating new channels. Each tactic will support the various levels of the funnel in the consumer journey, from first exposure of message awareness, to message recognition and finally desired action.

Tactics will achieve goals established within the campaign as both stand-alone mediums and complimentary extensions of traditional tactics, increasing reach, frequency and effectiveness. The digital media plan will span across various platforms including programmatic video, display, streaming online audio, CTV/OTT (already discussed) and social media methods. As video is a brand's most powerful storytelling tool, proven with successful results during the previous campaign, the majority of the buy will be executed as video placements. The campaign will also use display assets to generate mass reach and a large number of clicks to the destination URL at an efficient cost.

Placements will be executed on a premium publisher direct basis as well as programmatically utilizing on and offline data for audience segmentation targeting.

Selected online publishers will be incorporated that provide content indexing high with the target audience, addressing them with partners that will be most influential, encouraging engagement and conversation within the community. To motivate the target audience to learn more about the consequences associated with not wearing a seat belt, high impact attention grabbing units like takeovers and roadblocks will be used to launch the campaign in addition to video and display creative executions.

For effective message recall, a strong foundation of brand awareness is necessary in order to break through ad clutter and fragmentation that consumers face each day. With the state of today's media landscape, it's necessary to reach the audience with a multi-platform approach incorporating both traditional and digital tactics. Within all NHTSA media buys a true cross-screen strategy is executed.

Proposed Tactics

- ▶ Second Screen Content/Commercial Sync
- ▶ Programmatic Video/Display
- ▶ Social

Second Screen Content/Commercial Sync

As the landscape continues to evolve with new technology and media consumption platforms, audience fragmentation continues to increase year over year. The standard approach to traditional TV buying no longer applies for effectively reaching target audiences. It is reported that 80% of adults use two or more devices while watching TV, presenting a need for marketers to incorporate a multi-platform approach in order to cut through the clutter. Digital commercial sync and second screen content tactics extend viewing from traditional TV sets simultaneously onto user digital devices. Utilizing this advanced technology, we can bridge the gap between traditional and digital, reinforcing messaging with video and display ads sent across second or third screens in the same household.

Digital commercial sync and second screen content are executed via technology embedded into manufacturer TV sets with the capabilities to recognize any content that appears on the screen including linear TV, OTT, movies, gaming consoles, and both live and on delayed viewing with devices such as DVR. The embedded device has the ability to both listen and see visuals of the exact programming on TV sets down to fractions of a second. Each TV set can be identified by a household IP address (an Internet Protocol, or IP, address is a unique numerical label used to identify the household internet connection assigned by the internet service provider). Top indexing programming for the target audience will be identified prior to campaign start, enabling commercial sync technology to recognize the moment a user is exposed to such programming (such as ESPN, American Crime Story or Game of Thrones) then serving a video or display ad to the smartphone or tablet.

With this tactic, two main targeting focuses will be executed. The first as an extension to the linear TV schedules, providing a true cross-screen strategy. Ads will be served to those who have previously viewed a linear spot implementing high levels of ad frequency needed for message recall. This strategy will drive the target audience to take digital action via consumption of additional NHTSA videos or website traffic after the initial linear exposure, which is indicative to higher funnel broad reach awareness.

Additionally, we will utilize this tactic as a means to capture audiences that have not been exposed to the NHTSA linear messaging. We will identify these users in real time as the campaign progresses, boosting exposure levels with additional mobile, tablet and desktop digital video impressions.

Programmatic Video/Display

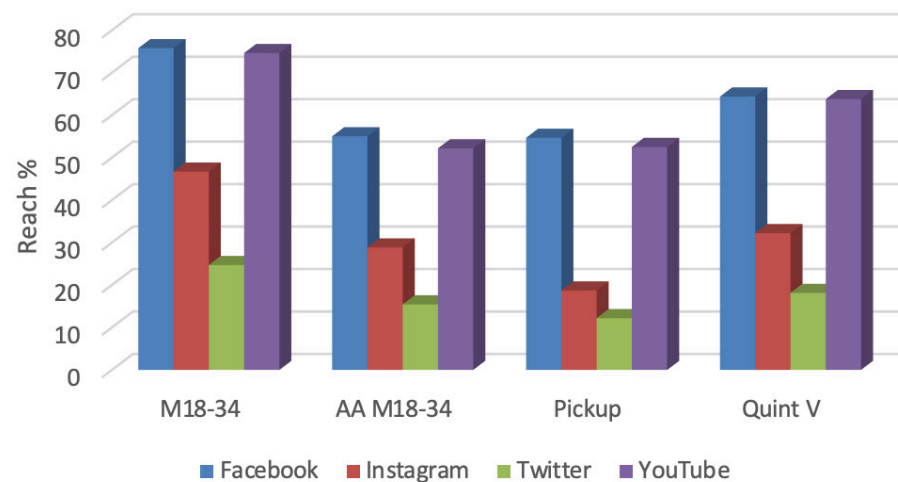
As the media landscape rapidly evolves, daily consumer ad exposure has increased drastically year over year. For effective brand lift and recall it has become imperative for marketers to reach target audiences at various touchpoints across multiple platforms. Display advertising will include visual assets such as banner ads, video and high impact rich media. These pieces will be placed to appear on both premium publisher direct sites and on other sites via programmatic buying with audience segmentation data. Within the overall tactic mix, display will provide increased visibility at the highest level of brand awareness. With this placement we are able to execute mass reach towards the target audience while remaining the most cost-efficient digital media source.

Social

Social media will continue to play an important role in the communications process. This will be done via a paid social campaign as well as by tapping into the social networks of personalities that Millennials engage with.

The top social sites for reaching the NHTSA target groups are Facebook, Instagram and Twitter.

Reach Potential of Social Media Sites - 30 Days



Source: 2018 GfK MRI Doublebase

State Level Media Extensions

The state level plans can execute a number of strategies off of the base provided in the national plan.

TV

The national plan will use programmatic, audience targeting and CTV/OTT to reach the “Click It or Ticket” audience with entertainment, non-sports programming. This will run on appropriate cable networks and will cover, due to audience targeting, a large number of them.

This allows the states to use local affiliates of the broadcast networks and networks the national plan will not use for the general market plans to place their local buys on appropriate dayparts and programming. The use of CTV/OTT will be with outlets such as Hulu but may also use full-episode-player inventory on networks’ online sites.

The national plan will run approximately 100 GRPs per week throughout the three-week flight via programmatic and audience targeting.

Radio

The national radio plan will be fairly heavy with approximately 100 GRPs per week throughout the flight. With this heavy level of radio, the states may want to consider using their local media dollars toward audio streaming opportunities, such as Pandora and Spotify, and extended reach potential partners such as Sound Cloud, TuneIn and Radio.com.

Digital

In this medium the states can establish tactics to build off the base created by the national plan. This can include using any of the many publisher sites that are created to reach young men geo-targeted throughout the state, or to key markets within the state. In addition, a programmatic digital effort at the local market level will build off of the national plan and expose the “Click It” message onto a number of other sites.

The states can tailor their messaging to speak specifically to people living within the state, so the ad is more 1:1. For example, the national buy will target the entire country, and we’ll speak on broad terms across all states. However, the states could tailor their ads and get 1:1 with messaging by saying, “Hey Tennessee!” or “Hey Texas!”, etc. The states could also use local photography that state citizens could quickly recognize.

Anticipated Budget Allocation

Advertising dollars will be allocated to broadcast and cable TV, radio, digital/social media and Hispanic mediums approximately as detailed below.

Final dollar allocations may be affected by inventory conditions at the time of the buy.

<u>Vehicle</u>	<u>% Allocation</u>
TV	35%
Radio	12%
Hispanic	15%
Digital	30%
Social	8%

Definitions

Linear TV

Television service where the viewer has to watch a scheduled TV program at the particular time it's offered, and on the particular channel it's presented on.

Programmatic TV

Programmatic TV advertising is the data-driven automation of audience-based advertising transactions.

Synched

Extends digital ads to people who have seen the NHTSA spot, or watched specific television programs, from all sources, or any other appropriate content on the TV screen to the users' smartphone.

Connected TV/Over-the-top (CTV/OTT)

Besides the traditional functions of TV sets and set-top-boxes provided through traditional broadcasting media, connected TVs can also provide internet TV, online interactive media and over-the-top content as well as on-demand streaming media.

In broadcasting, over-the-top content (OTT) refers to delivery of audio, video and other media over the Internet without the involvement of a multiple-system operator (cable provider) in the control or distribution of the content.

TV Everywhere

Television broadcasters allow their customers to access content from their network through internet-based services, either live or on-demand, as an aspect of their subscription to the service from a paid TV provider.

For example, if you have a cable subscription you can download the ESPN Watch App and watch ESPN programming on your computer, tablet or phone – everywhere.